

# **EXCEPTION MANAGEMENT**User Guide



# **CONTENTS**

EXCEPTION MANAGEMENT	5	
OVERVIEW	7	
Objectives	7	
Accessing the Exception Management module	7	
Searching for an exception	8	
Accessing an Exception Management Sheet	8	
EXCEPTION CREATION AND MANAGEMENT	9	
Logging an exception	9	
Starting the exception resolution workflow	11	
Initiating an Improvement Plan from the Exception Sheet	12	
Viewing all the exceptions logged with a supplier	13	



#### Overview

#### **Objectives**

IVALUA BUYER provides an integrated exception management module that streamlines the logging, tracking, and resolution of supplier issues.

The exception management module is coupled with an improvement plan management module that helps you list and follow up associated preventive and corrective actions.

IVALUA BUYER allows you to log and manage exceptions in relation to:

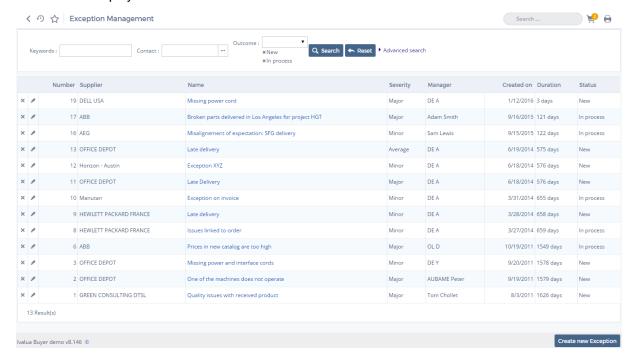
- Suppliers
- Contracts
- Sourcing processes
- Orders
- Receipts
- Invoices

Exceptions may be of different types (Delay, Price, Quality, General) and severity level (Minor, Average, Major).

In the course of its lifecycle, an exception will go through various statuses (New, In progress, Solved) driven by its validation workflow.

#### **Accessing the Exception Management module**

Select the menu Suppliers / Exception Management. The Exception Management page displays.



IVALUA BUYER 7

#### Searching for an exception

The upper part of the *Exception Management* page contains search filters. These filters let you easily retrieve an exception or a set of exceptions meeting specific criteria.

- 1. Define your search criteria by selecting appropriate filters.
- 2. When done, click the **Search** button to start searching. Matching items are displayed in the results list.

To cancel selected filters and go back to the default list, click the Reset button.

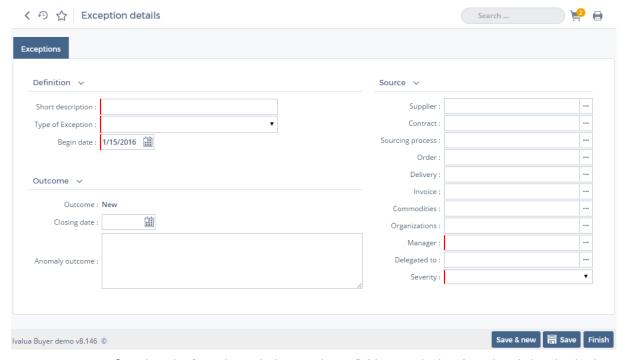
# **Accessing an Exception Management Sheet**

In the exceptions' list (Suppliers / Exception Management), locate the exception record you wish to open and click its Edit icon . The exception record displays.

# **Exception Creation and Management**

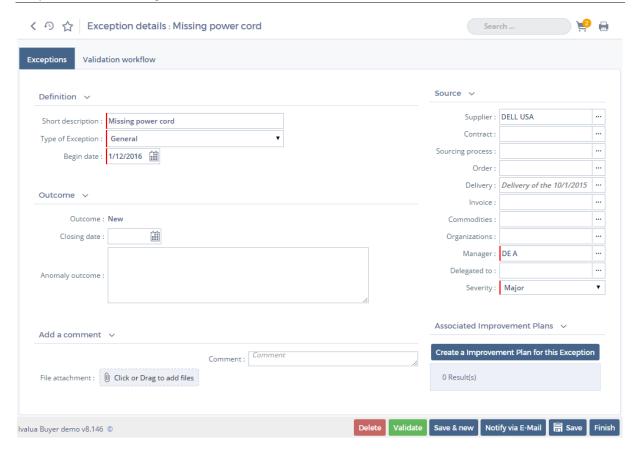
#### Logging an exception

1. In the exceptions' list (Suppliers / Exception Management), click the button Create new exception. A blank exception sheet displays.



- 2. Complete the form, in particular mandatory fields, namely the short description, begin date, manager, type and severity of the exception.
- 3. Link the exception to one of the following items: supplier, contract, sourcing process, order, delivery or invoice. To do so, click the *Selector* button associated with the desired type of item and select your item from the list that displays.
- 4. When done, click the **Save** button.

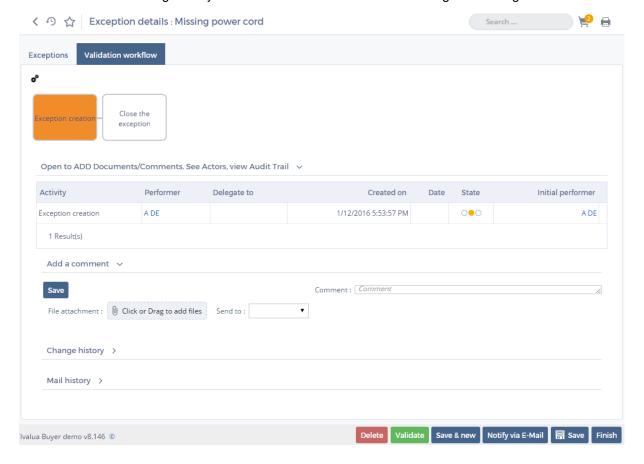
9



### Starting the exception resolution workflow

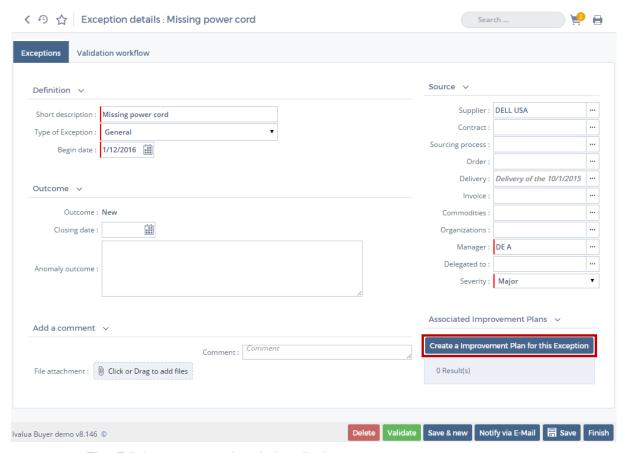
The progression of the exception within its resolution workflow can be viewed in the *Progress* tab.

At each validation of a workflow step, the exception changes status and the performers of the following activity will receive an email notification inviting them to log in.

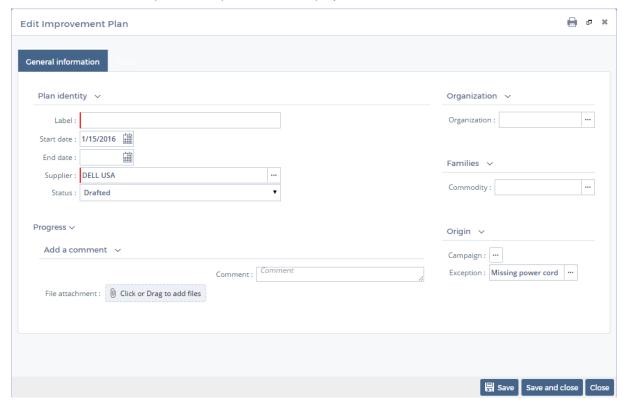


### Initiating an Improvement Plan from the Exception Sheet

In the Exception tab, click the button Create an Improvement Plan for this Exception.



The Edit improvement plan window displays.



The plan is automatically linked to the exception it is initiated from.

To obtain further information on how to manage improvement plans, please refer to the user guide dedicated to this module.

## Viewing all the exceptions logged with a supplier

- 1. Select the Suppliers / Suppliers menu, locate the Supplier Record you wish to open, and then click its Edit icon. The selected Supplier Record displays.
- 2. Show the *Activity* tab. The *Exceptions* frame lists the exceptions currently logged with the supplier.

